

Microsoft® Office SharePoint® Server 2007 Training

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SharePoint 2007 Overview



SharePoint 2007 Overview

Microsoft Office SharePoint Server 2007

Portal Site Templates

Site Definitions

My Site personal Site

Social Networking

Privacy Controls

Site and Documents Roll-Up Web Part

Colleagues and Memberships Web Part

Single Sign-On (SSO)

Portal

Search

Content Management

Business Processes

Business Intelligence

Consistent Search Experience

Relevance

Uniform, Scalable User Experience

Content Sources

People and Expertise Searching

Business Data Search

Search Manageability

Indexing Management

Content Scopes

Extensibility and Programmability

Common Search Technology and Infrastructure

Document

InfoPath Workflow Forms

Document Information Panel

Document Converters

Records

Policy and Auditing

Records Repository

Search and Process

Web

Page and Site Customization

Portal Content and Branding

Customization

Variations and Multi-Language Sites

Deploying Content Between Servers

Page Publishing using Document

Converters

Web Publishing and Deployment

Business Data Catalog

Business Data SharePoint Lists and Web Parts

Business Data Actions

Data Connection Libraries

Dashboards

Report Center Web Sites

Excel Services

Web Access to Workbooks

Programmatic Access to Workbooks

Integrated, Flexible Publishing

Excel Services Management

Data Connection Libraries

Built on the XML Industry Standards

Browser-based Forms

powered by InfoPath Forms Services

"Design Once" Development Model

Form Import Wizard

Advanced "No-code" Form Features

Integrated Deployment Model for "No-code" Forms

Native Support for Web Services

and Customer-defined Schemas

Multiple Form Views

Design Checker

Rich Administrative Options

for Form Deployment and Management

Feature = New

Feature = Enhanced

CIT SharePoint 2007 Hosting Services

CIT has built a fully redundant, resilient, and well designed SharePoint 2007 hosting services that includes:

- Centrally managed and fully redundant environment
- Document-level backup and restore
- 24x7 site monitoring
- Access from public internet without VPN (optional)
- SSL encryption (optional)
- Integration with SSO and Federation Services
- Development site

Interested in CIT SharePoint 2007 Hosting Services?



Windows Hosting Operations Group

Email: citsharepoint@mail.nih.gov

Telephone: 301-435-7138

Website: moss.cit.nih.gov/community

CONTACT INFORMATION

Topics

- Section I: SharePoint document libraries
- Section II: SharePoint calendars
- Section III: SharePoint discussion list
- Section IV: SharePoint issues tracking list
- Section V: SharePoint contacts list
- Extras

Before we start the training...

Section I contents

- SharePoint document libraries
 - Lesson 1: Why use document libraries?
 - Lesson 2: How to add and edit files

Each lesson concludes with a short follow along demo to reinforce your understanding of the material.

Section goals

- See how valuable a document library can be to you and your coworkers.
- Make files available to others by adding them to a document library.
- Edit and save files in a document library.
- Discover what happens when two people try to edit a file at the same time, and know how to handle that.

Lesson 1

Why document libraries?

Why document libraries?



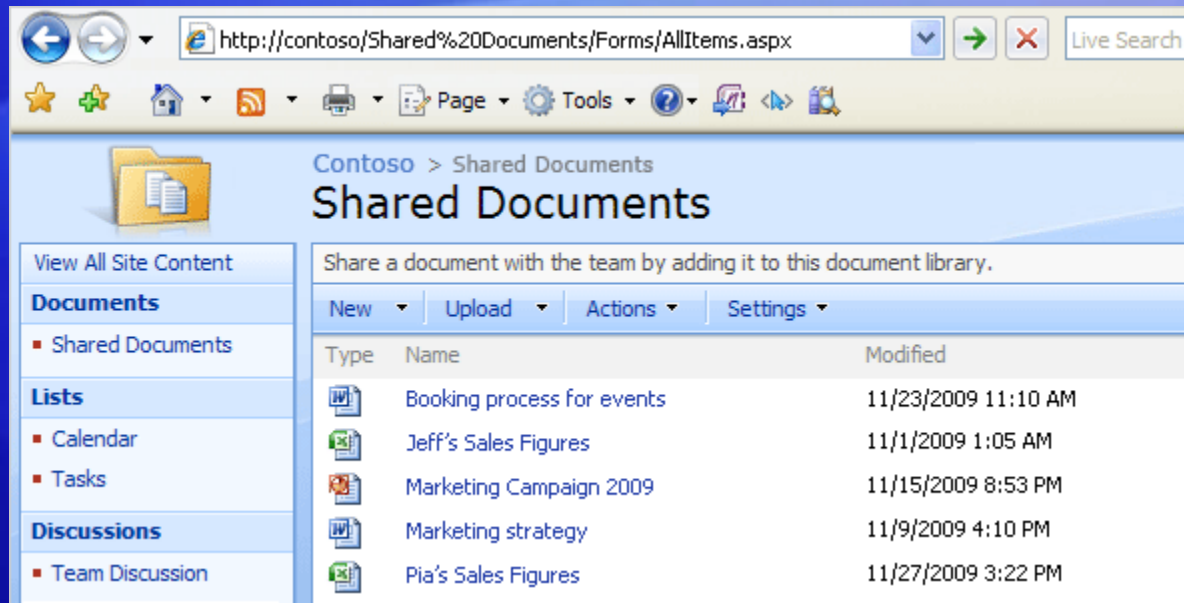
Sharing files with others is essential to getting things done nowadays.

But just how should you share files?

You could e-mail them to people or put them on a network folder somewhere.

But if your organization has a Windows SharePoint Services 3.0 site or Microsoft Office SharePoint Server 2007, the best way to share files is to use a **document library**.

What is a document library?

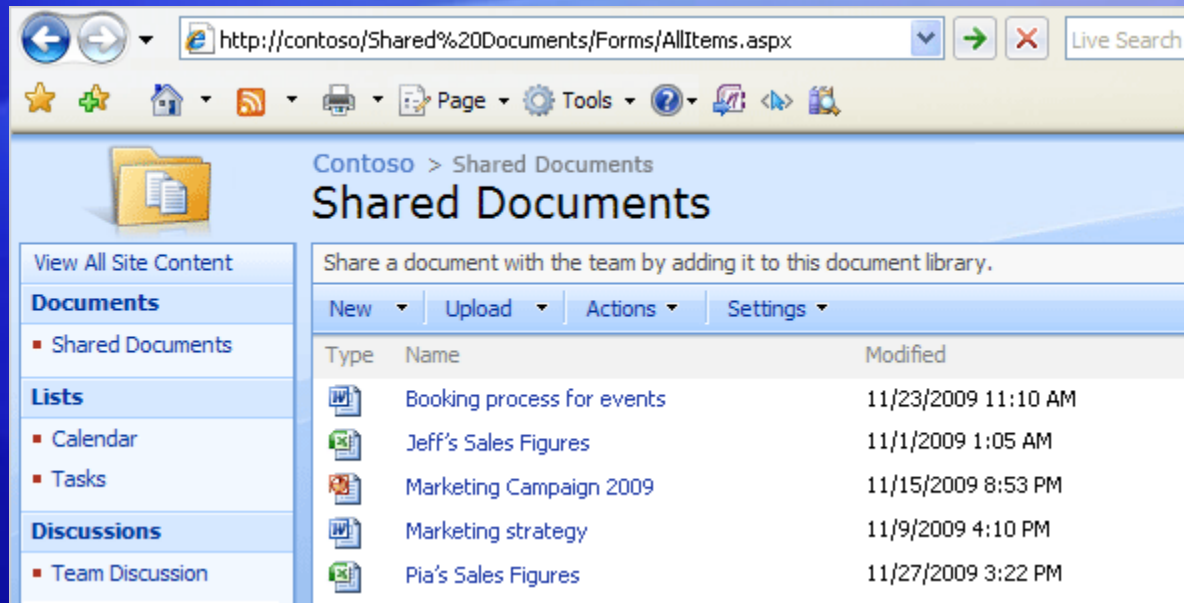


A SharePoint **document library** is a place on a site where you can create, collect, and update files with others.

In this example, employees are using a document library called “Shared Documents.”

They have added files to the library, and now people can make changes to them.

What is a document library?

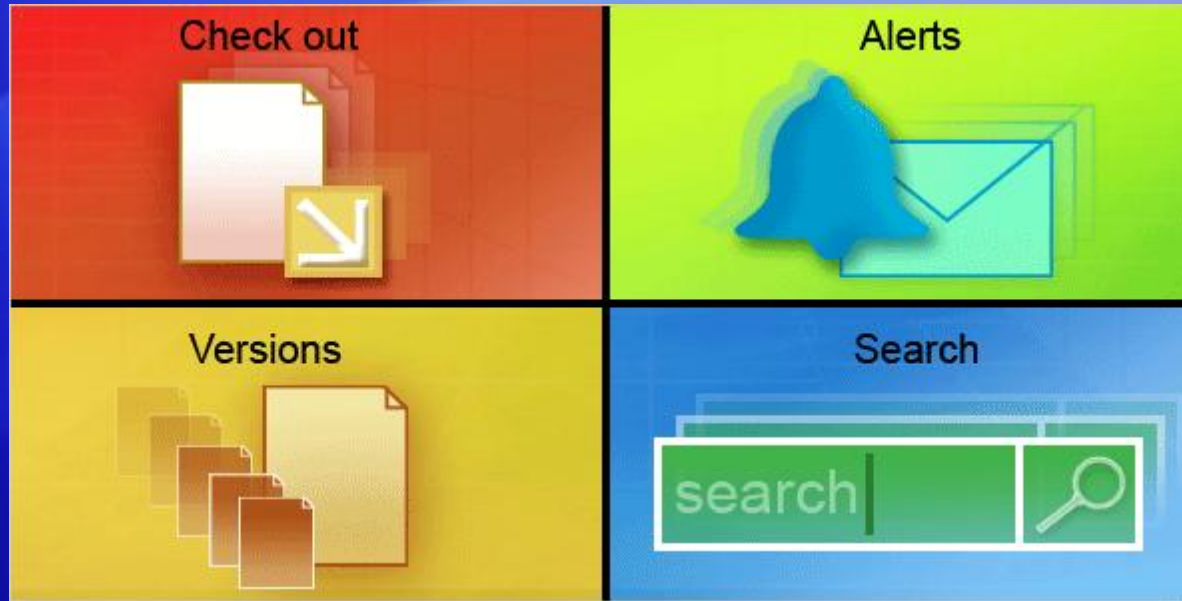


A SharePoint **document library** is a place on a site where you can create, collect, and update files with others.

Those changes will be stored in the library — not on their own computers.

And, because the library is on a Web site, other people can easily access the files using a Web browser, provided they have the permissions to do so.

Good reasons to use a library



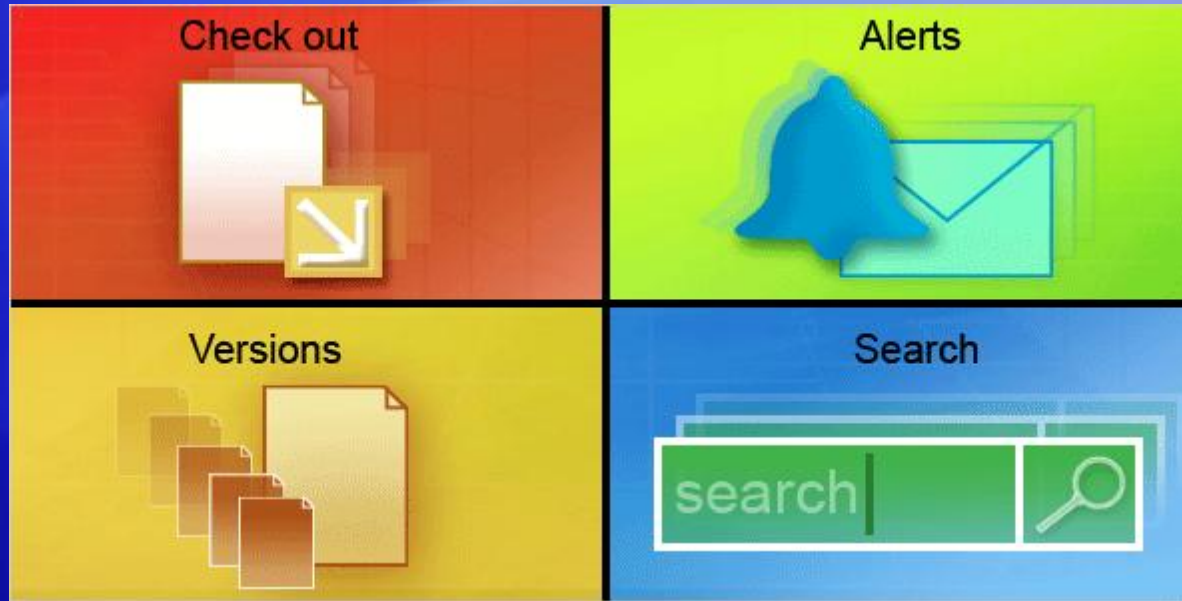
You might be thinking, “Why not just e-mail a file to my colleagues or use a network folder to share files?”

Because SharePoint document libraries provide more control.

There are many ways they do this:

- **Checkout:** You can check out a file to reserve it for your use so that others cannot change it while you are working on it.
- **Versions:** A library can also be set up to store previous versions for archiving purposes.

Good reasons to use a library



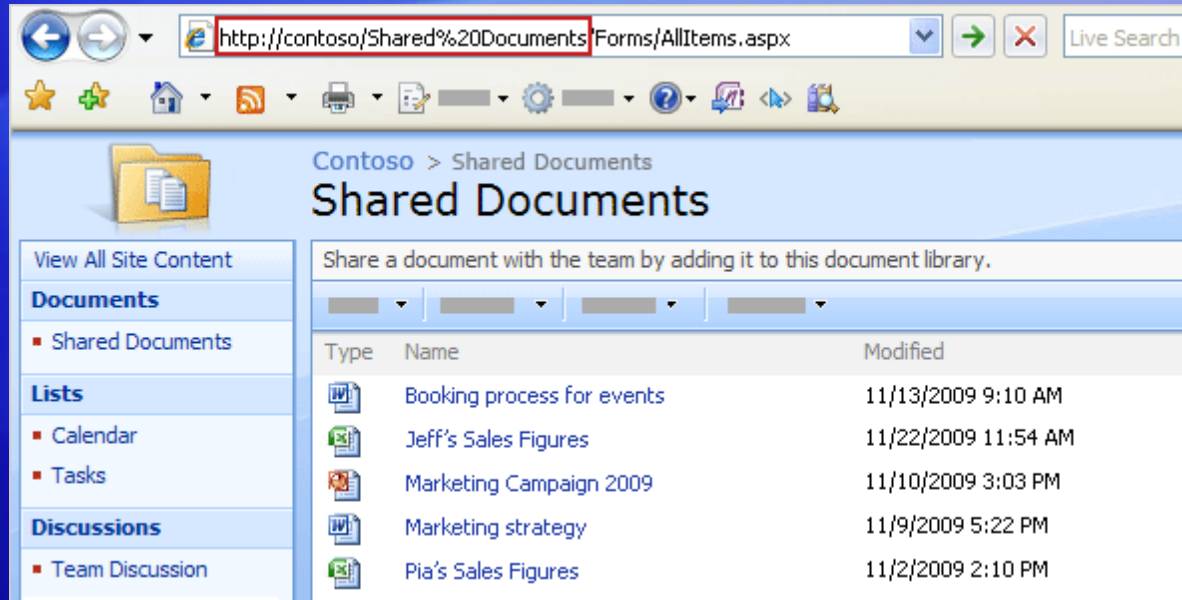
You might be thinking, “Why not just e-mail a file to my colleagues or use a network folder to share files?”

Because SharePoint document libraries provide more control.

There are many ways they do this:

- **Alerts:** You can set up e-mail alerts so that you are notified if a file is changed by someone else.
- **Search:** Libraries can also be set up so that they are searchable.

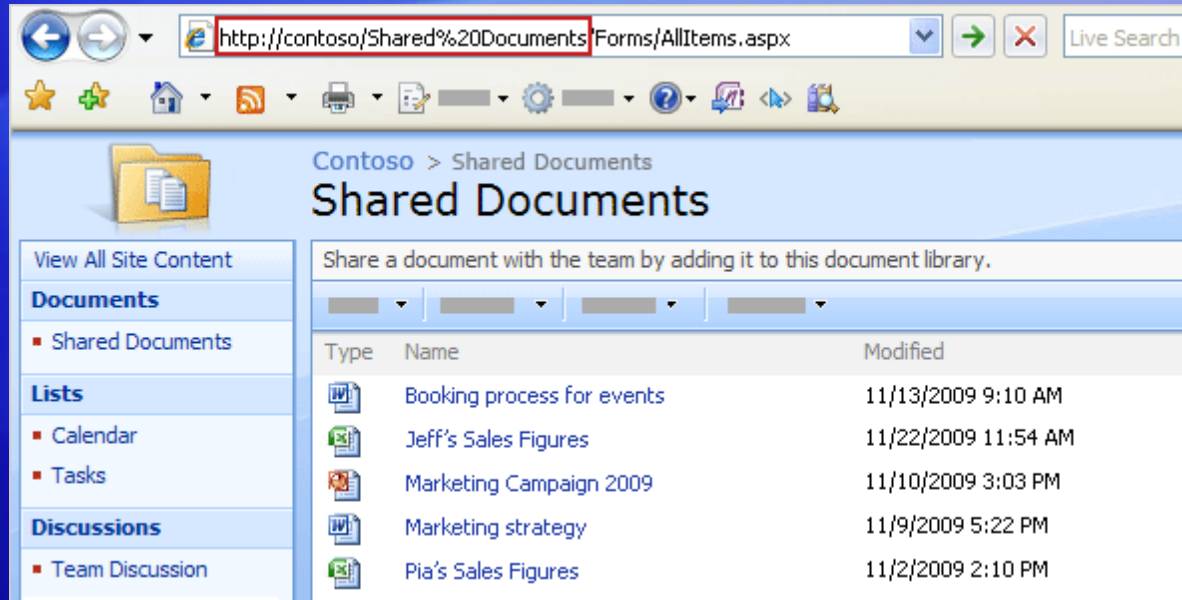
The URL is important



Once you've found the document library you want to work with, you'll want to become familiar with the URL of the library.

The URL of the library is at the top, in the address bar. And you only need to become familiar with everything before "Forms/AllItems.aspx."

The URL is important



Once you've found the document library you want to work with, you'll want to become familiar with the URL of the library.

Add this URL to your Web browser favorites for quick and easy access. Eventually, you may even have it memorized because you'll use it often to access files.

Lesson 1 Demo

1. Create a document library

- **Configure permissions**
- **Activate versioning**
- **Add document library URL address to favorites**
- **Q/A**

Lesson 2

How to add and edit files

How to add and edit files



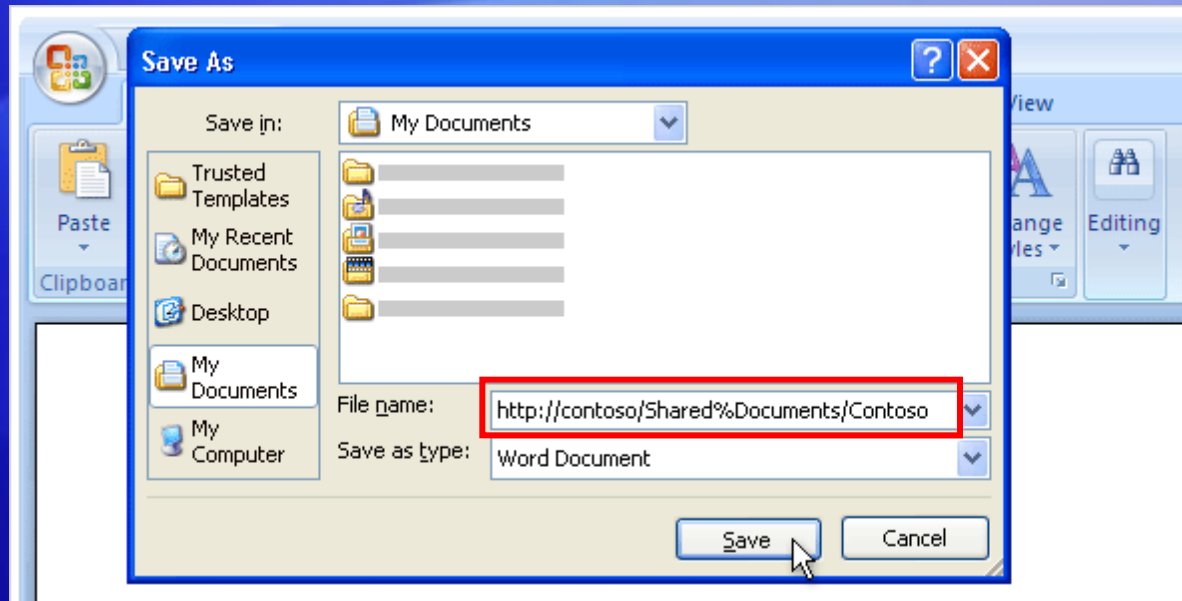
Wondering how to actually work with a document library?

You're in the right place.

This lesson will show you how to add and edit library files by using Word, Excel, and PowerPoint 2007.

You'll also learn what happens when two people try to edit a file at the same time, and how to handle that.

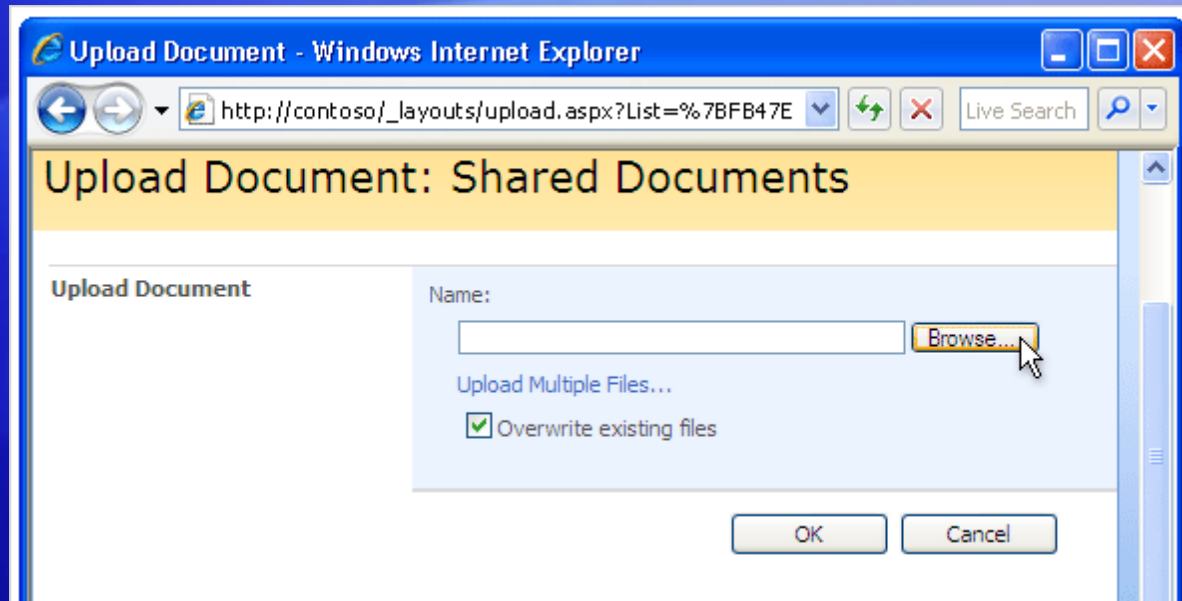
How to save a file to a library



Adding a file to a library is similar to the way you save files to your computer.

But instead of specifying a location on your computer when you save the file, you type in the URL for your library — that is, everything before “Forms/AllItems.aspx.”

How to upload files to a library

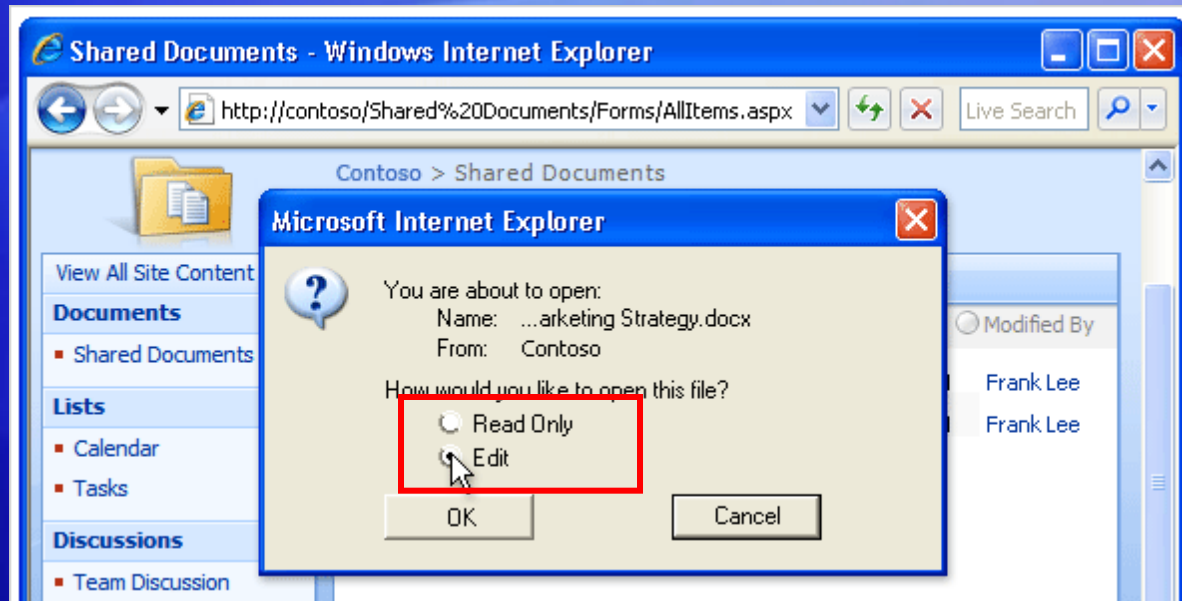


What if you already have your files saved to your computer and now you just need to get them up to the library somehow?

To do that, you go to the document library in your Web browser and then click **Upload**.

Then, as the picture shows, you can click **Browse** to locate the file on your hard disk.

How to edit a file



Once your Word, Excel, and PowerPoint files are there, what do you do with them?

For example, how might you edit this marketing strategy document?

When you need to work with a file and make changes, you edit the file.

The picture shows what you'll see when you do this in Word 2007; click **Edit** to make changes to the file. (The process is the same in Excel 2007 and PowerPoint 2007.)

People can edit, one at a time

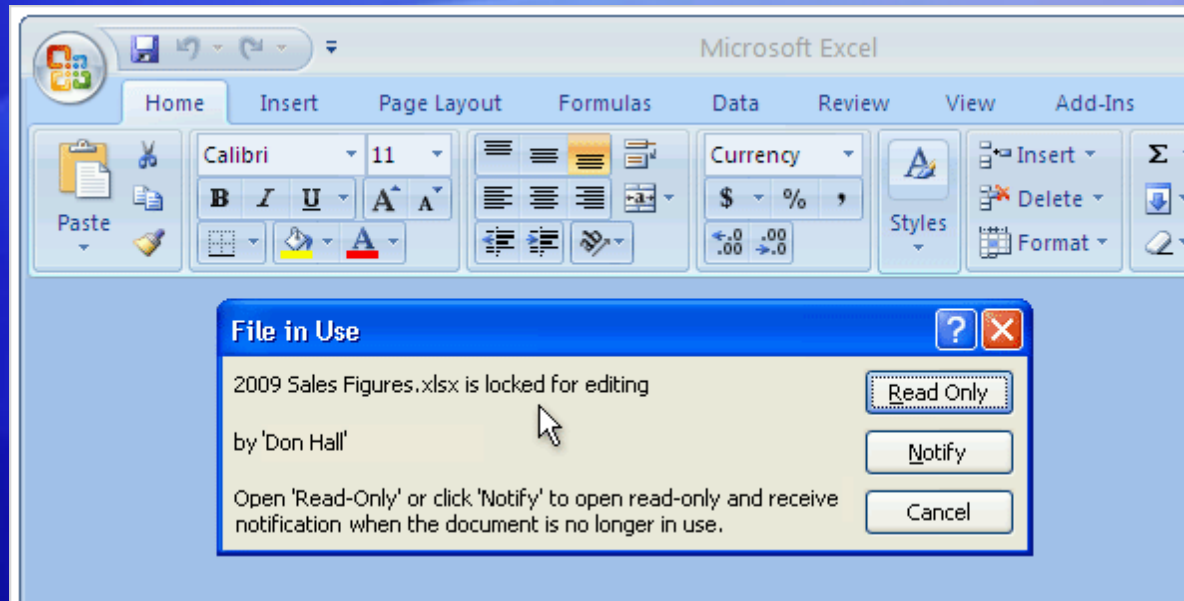


With a library, when people edit the file one at a time, true collaboration takes place.

Each person can contribute to the file in their own time. There's no need for extra meetings, printing extra copies, walking about the halls for revisions, and so on.

For example, if Frank and Ellen both need to work on a marketing strategy document, they take turns editing it, one at a time.

When you don't take turns



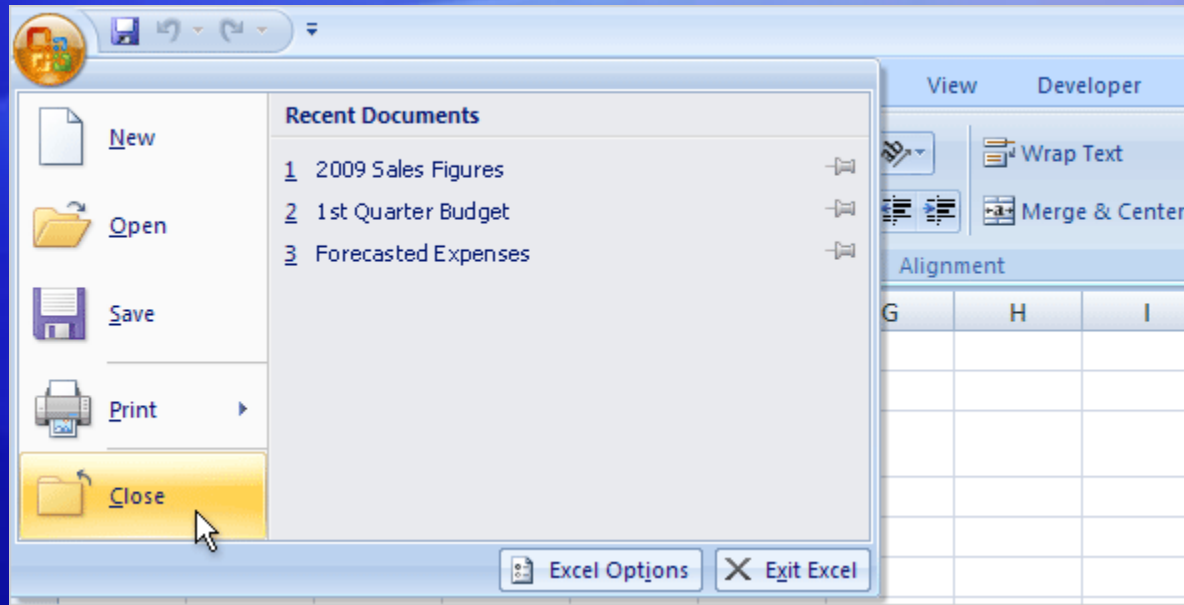
What happens when you don't take turns? The first one who edits the file will lock out the other person.

In other words, two people cannot edit the same file at the same time.

This picture shows what happens when one person tries to edit the file at the same time as another person.

A **File in Use** message appears. Once Don Hall closes the file, the file will be editable again.

Avoid locking the file by closing it

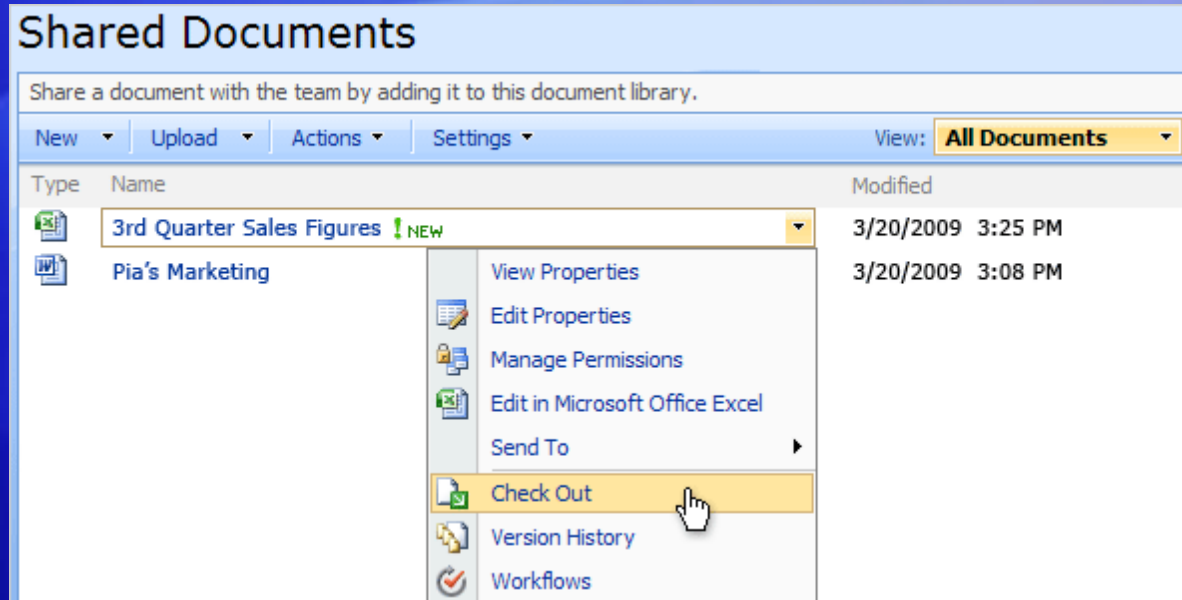


In the previous section, you saw how one person can lock others out of a file if that person has it open.

The way to unlock the file is to close it.

This is an important step to remember. If you don't close the file, confusion can result.

How to check out a file

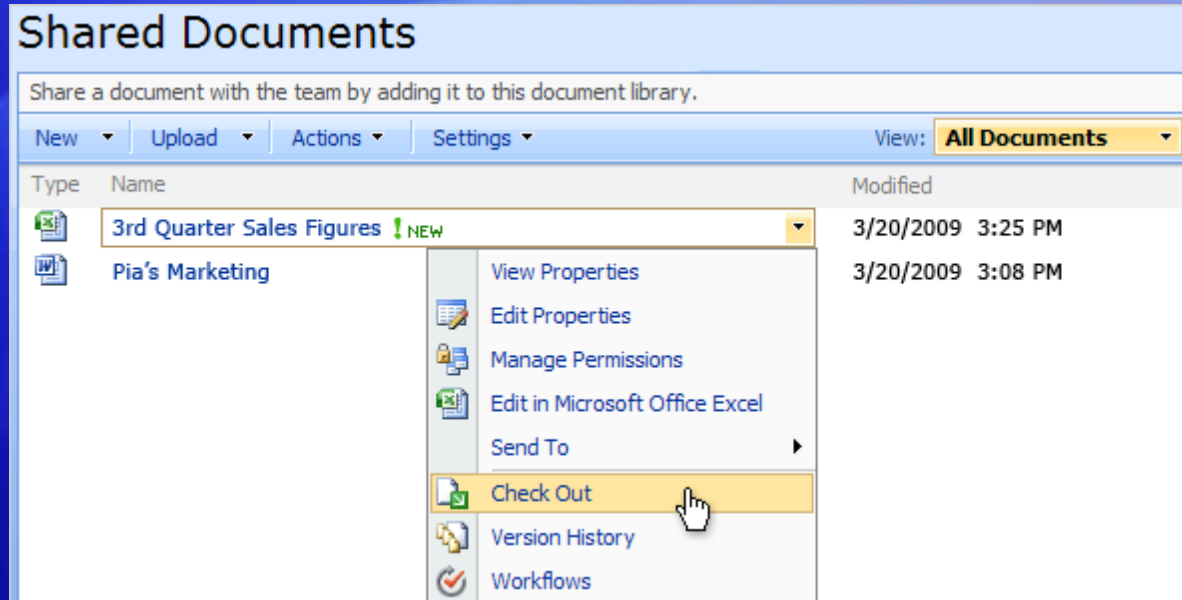


To check out a file, you do something extra before you edit the file.

You place your pointer over the file name, click the down arrow that appears, and then click **Check Out**.

This will reserve the file for only you to work on so that other people cannot make changes.

How to check out a file

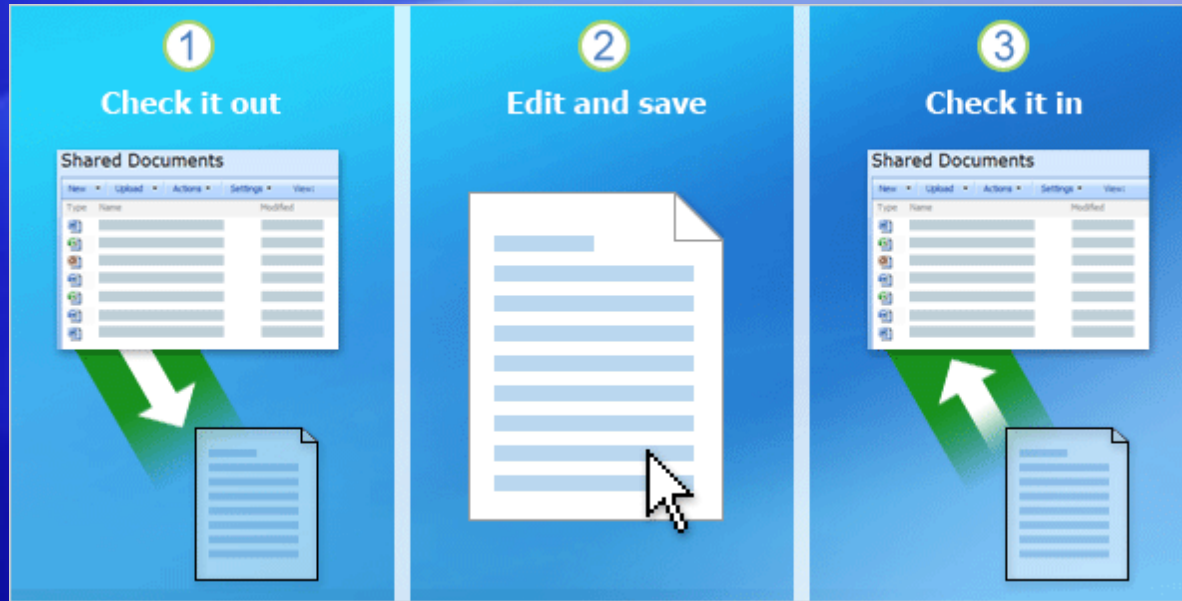


Should you always check out files? Not necessarily.

If you need to make a quick change that you know will take only a few minutes, then checkout is not necessary.

But if there's a chance that your changes will take longer than 15 minutes, we recommend checking out the file before editing it.

The overall process

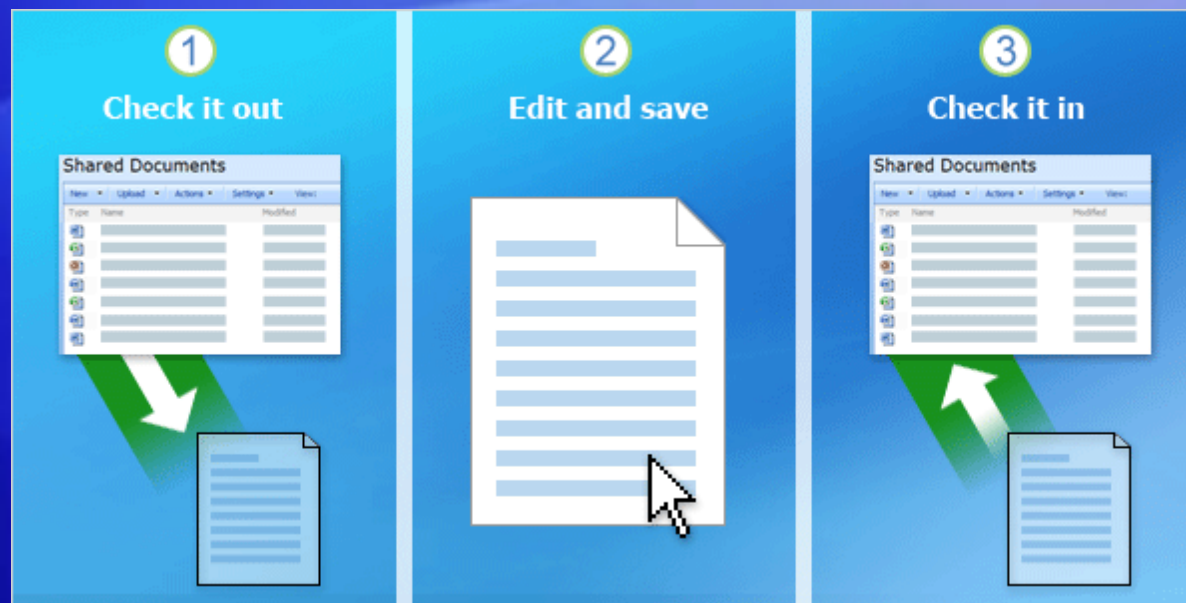


How does checking out a file for use in Microsoft Office Word 2007, Microsoft Office Excel® 2007, or Microsoft Office PowerPoint® 2007 work?

Here's a general explanation:

- 1 Check out the file. At this point, the file is reserved for only you to work on.
- 2 Edit and save. You edit the file by clicking its file name in the library. When the file opens, you work on it and save as many times as you need to.

The overall process

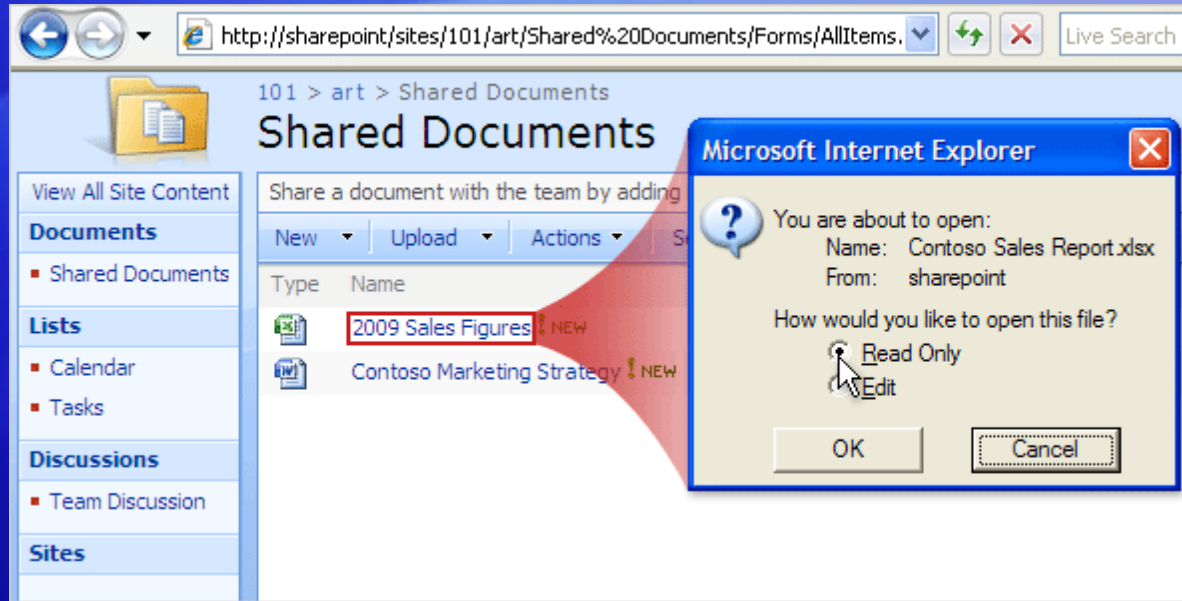


How does checking out a file for use in Microsoft Office Word 2007, Microsoft Office Excel® 2007, or Microsoft Office PowerPoint® 2007 work?

Here's a general explanation:

- ③ Check in the file. When you check in the file, others will see your changes and will be able to edit the file.

Avoid locking the file unnecessarily



In addition to closing the file when you are done, there's another way to avoid locking files: Open them as **Read Only**.

You should do this when you don't need to change the file at all but you do need to read it or refer to it.

When the file opens, you won't be able to make changes, of course. However, others will still be able to edit the file when you have it open as Read Only, so you won't lock them out.

Lesson 2 Demo

1. Document library files management

- **Save a file**
- **Upload files to**
- **Edit a file**
- **View and restore a file from file version history**
- **Email a document link**
- **Q/A**

Section II contents

- SharePoint calendars
 - Lesson 1: Use a calendar on a SharePoint site

Each lesson concludes with a short follow along demo to reinforce your understanding of the material.

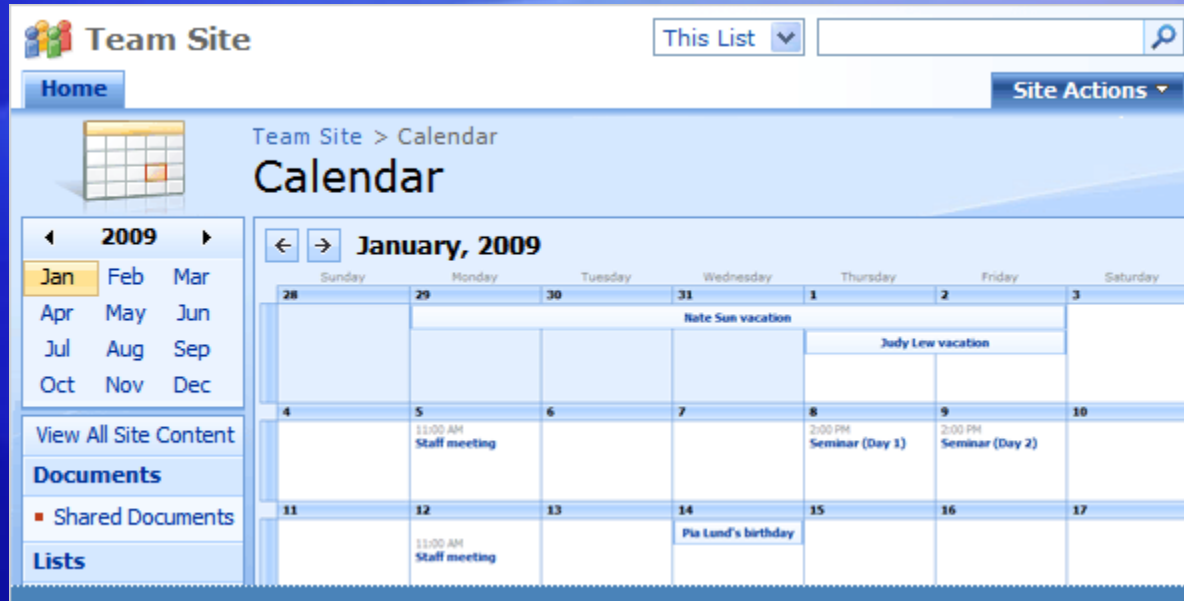
Section II goals

- Share schedule information by entering it in a shared calendar on the SharePoint site.
- Easily move around in the shared calendar on the SharePoint site.
- Update or delete entries in the shared calendar.

Lesson 1

Use a calendar on a
SharePoint site

Use a calendar on a SharePoint site



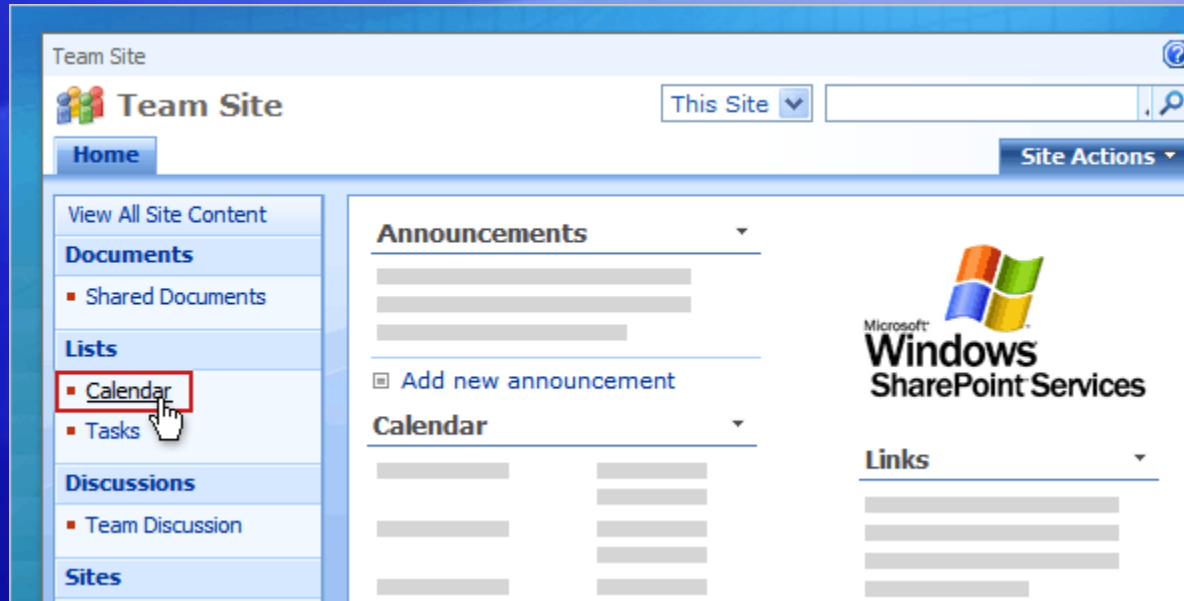
Why use a calendar on a SharePoint site?

Because it's a great way to share information using the familiar context of a calendar.

A calendar on a SharePoint site is similar to a whiteboard calendar that you might put up in your building's hallway or break room.

Like that whiteboard, the SharePoint calendar is in a public place — the SharePoint site, where anyone with access to the site can see and use it.

See the calendar

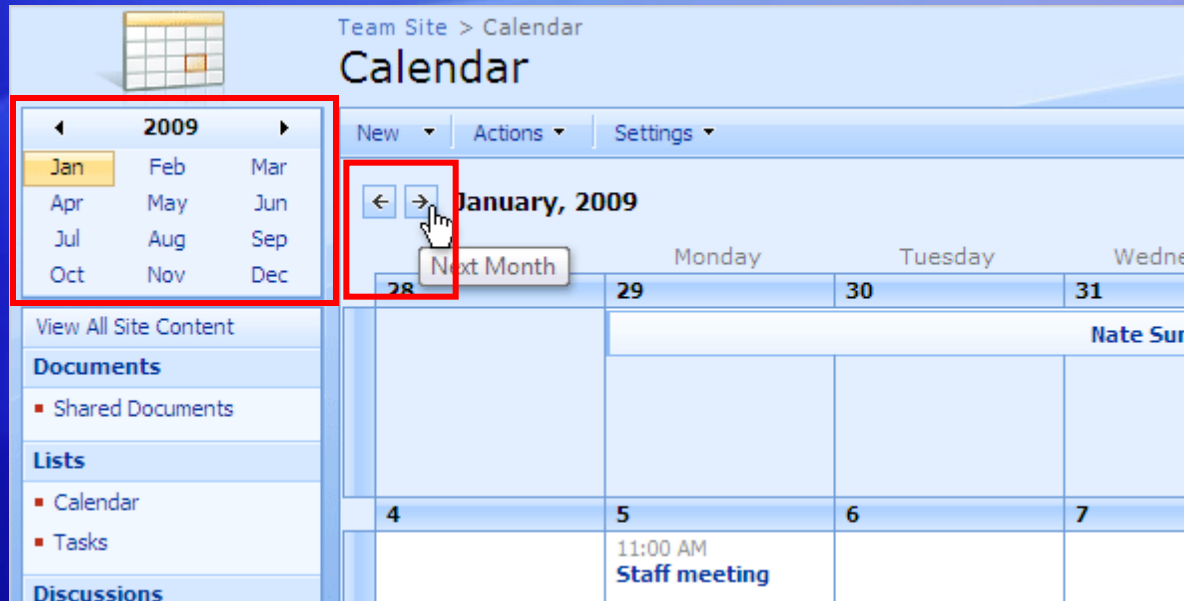


So, you're ready to try using a calendar on your organization's SharePoint site.

With many standard deployments of a SharePoint site, a calendar is already in place.

If that's the case for you, all you'll need to do to access the calendar is click **Calendar** under **Lists** on the Quick Launch, as shown in the picture.

Get around in the calendar



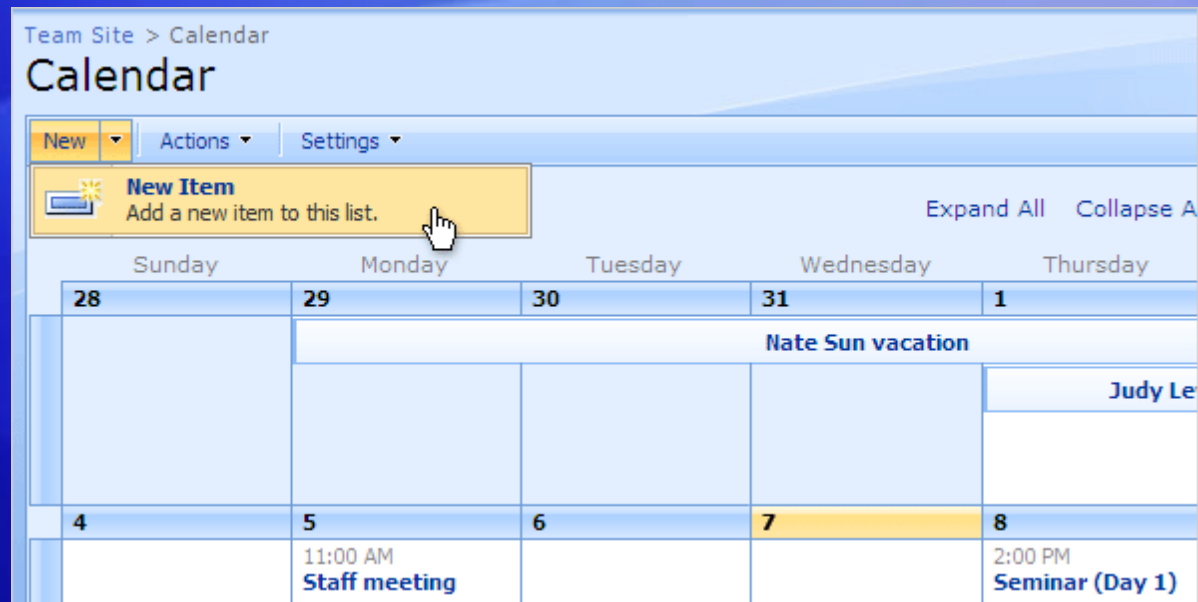
Once you find your calendar, you'll need to know how to get around in it.

You'll do that by clicking the different controls on the page.

You can move from month to month, week to week, or day to day by using the arrows. And you can look at a day, a week, or a month at a time by using the buttons of the same name.

To quickly move to different years or months, use the small calendar above the Quick Launch.

Enter items



The screenshot shows the SharePoint 'Calendar' page. At the top, there's a breadcrumb 'Team Site > Calendar' and the title 'Calendar'. Below the title is a ribbon with 'New', 'Actions', and 'Settings' tabs. The 'New' tab is active, and a 'New Item' button is highlighted with a mouse cursor. The button text reads 'New Item' and 'Add a new item to this list.' Below the ribbon, there's a calendar grid. The grid shows days from Sunday to Thursday. The date 28 is on Sunday, 29 on Monday, 30 on Tuesday, 31 on Wednesday, and 1 on Thursday. A note 'Nate Sun vacation' is visible on Monday. The date 4 is on Sunday, 5 on Monday, 6 on Tuesday, 7 on Wednesday, and 8 on Thursday. A note '11:00 AM Staff meeting' is visible on Monday, and '2:00 PM Seminar (Day 1)' is visible on Thursday.

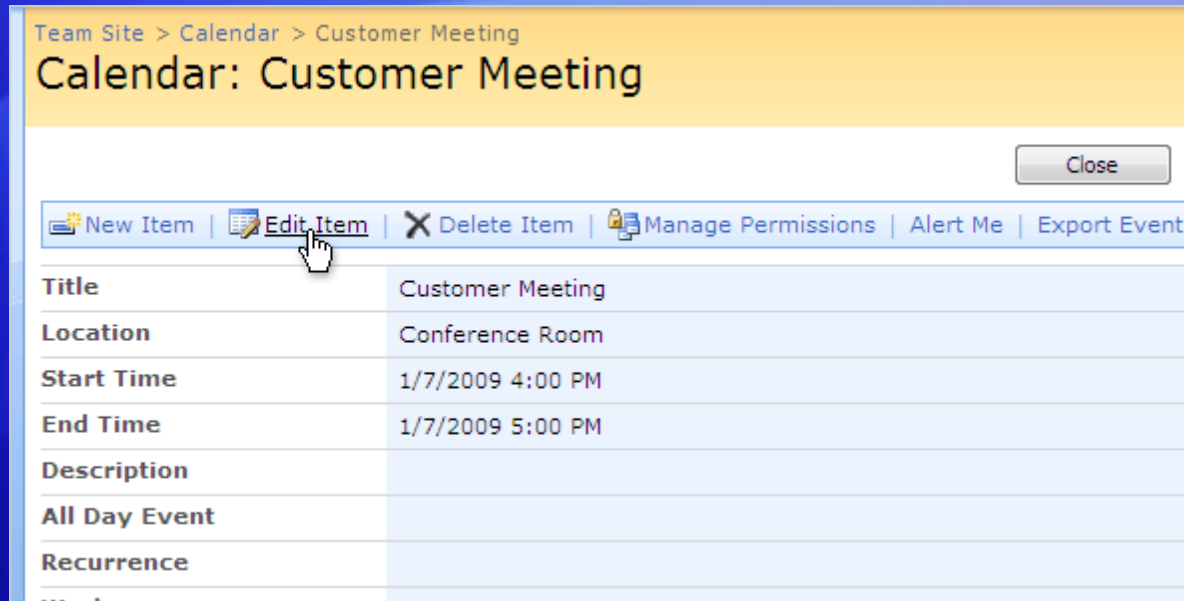
Now you'll add calendar entries one at a time by clicking **New Item** on the **New** menu.

Then you'll enter the item's details in a form.

It's easy to create both one-time items and recurring items, such as a weekly staff meeting.

For recurrence, select the **Make this a repeating event** check box and then set the item's recurrence pattern.

Change in plans? Edit or delete an entry



The screenshot shows a SharePoint interface for a calendar entry titled 'Customer Meeting'. The breadcrumb trail at the top reads 'Team Site > Calendar > Customer Meeting'. Below the title is a 'Close' button. A horizontal menu contains several options: 'New Item' (with a plus icon), 'Edit Item' (with a pencil icon and highlighted by a mouse cursor), 'Delete Item' (with an X icon), 'Manage Permissions' (with a lock icon), 'Alert Me', and 'Export Event'. Below this menu is a table with the following details:

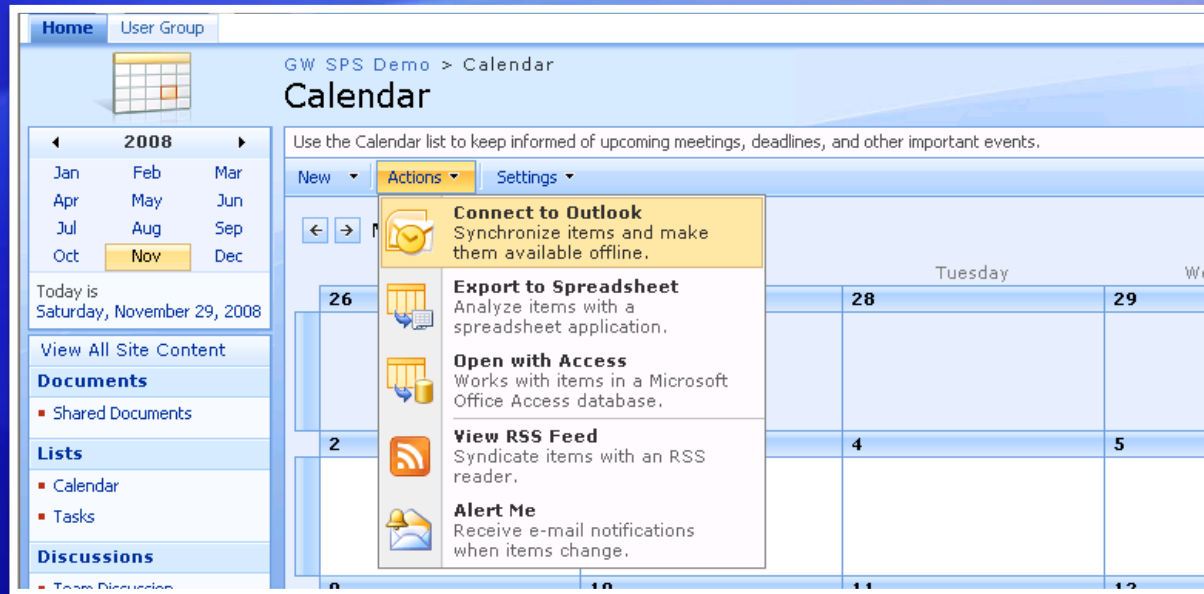
Title	Customer Meeting
Location	Conference Room
Start Time	1/7/2009 4:00 PM
End Time	1/7/2009 5:00 PM
Description	
All Day Event	
Recurrence	

Schedules change; you want to be able to update existing calendar entries to reflect those changes.

To modify an item in the calendar, click its link to open it. Then change the details by clicking **Edit Item**, as shown in the picture.

To completely remove an item from the calendar, click its link to open it, and then click **Delete Item**.

SharePoint calendar in Outlook

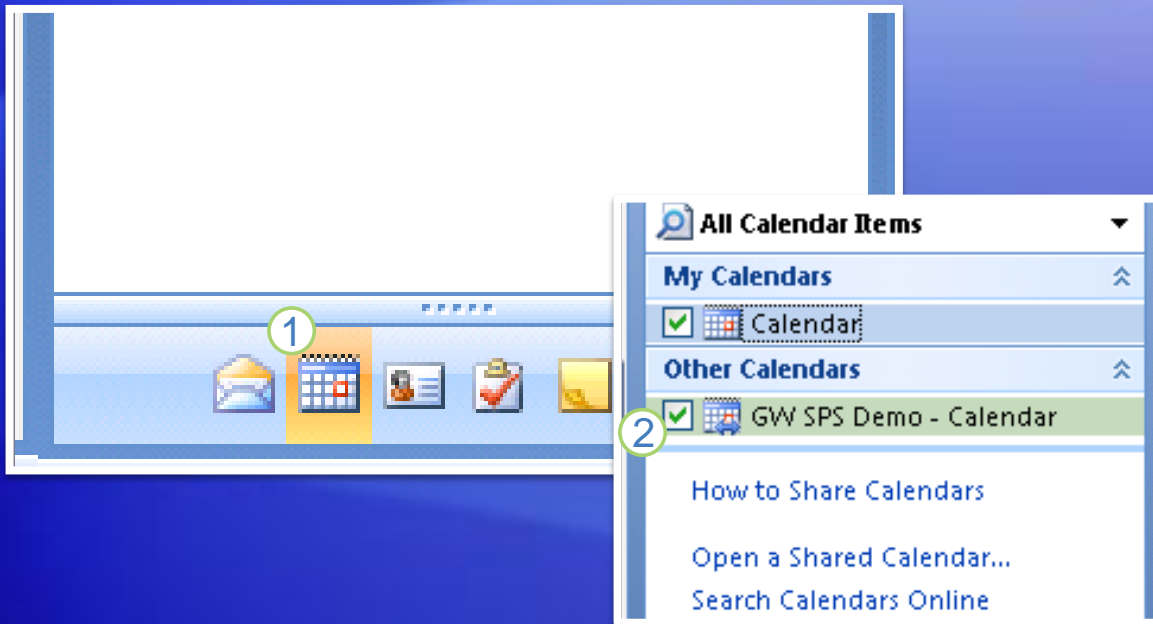


The benefit of using a calendar on a SharePoint site is that others will be able to see it and add to it. Beside on the SharePoint site, users can edit from Outlook — but first they'll need to connect to it

An easy way to see the calendar is by connect it to Outlook.

You'll see the calendar under the other calendars section of your Outlook in the calendar view.

SharePoint calendar in Outlook



To see the connected calendar, if you're using the Outlook 2007, is to follow these steps.

- 1 In Outlook, navigate to the calendar view.
- 2 Click on the SharePoint calendar under the Other Calendars section.

Lesson 1 Demo

1. Use a calendar on a SharePoint site

- **Navigate in SharePoint calendar**
- **Add a new event**
- **Edit or remove an event**
- **Connect a calendar to Outlook**
- **Q/A**

Section III contents

- SharePoint discussion list
 - Lesson 1: Use a discussion list on a SharePoint site

Each lesson concludes with a short follow along demo to reinforce your understanding of the material.

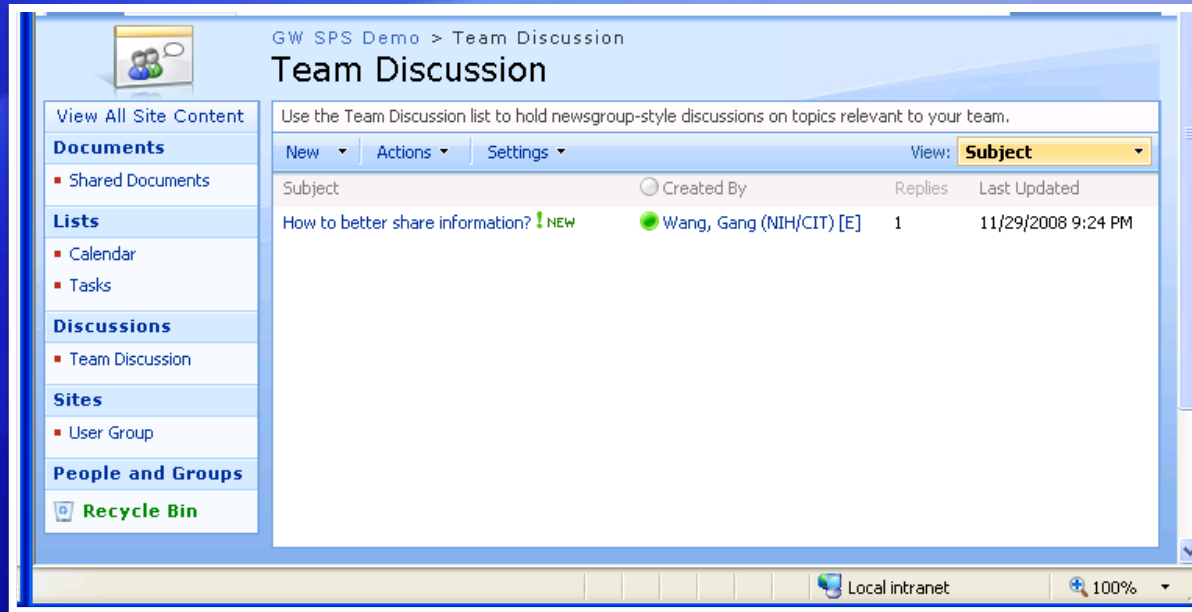
Section III goals

- Conduct collaboration activates by holding discussion it in a shared discussion list on the SharePoint site.
- Easily move around in the discussion list on the SharePoint site.
- Reply, edit, or delete entries in the discussion list.

Lesson 1

Use a discussion list on a
SharePoint site

Use a discussion list on a SharePoint site



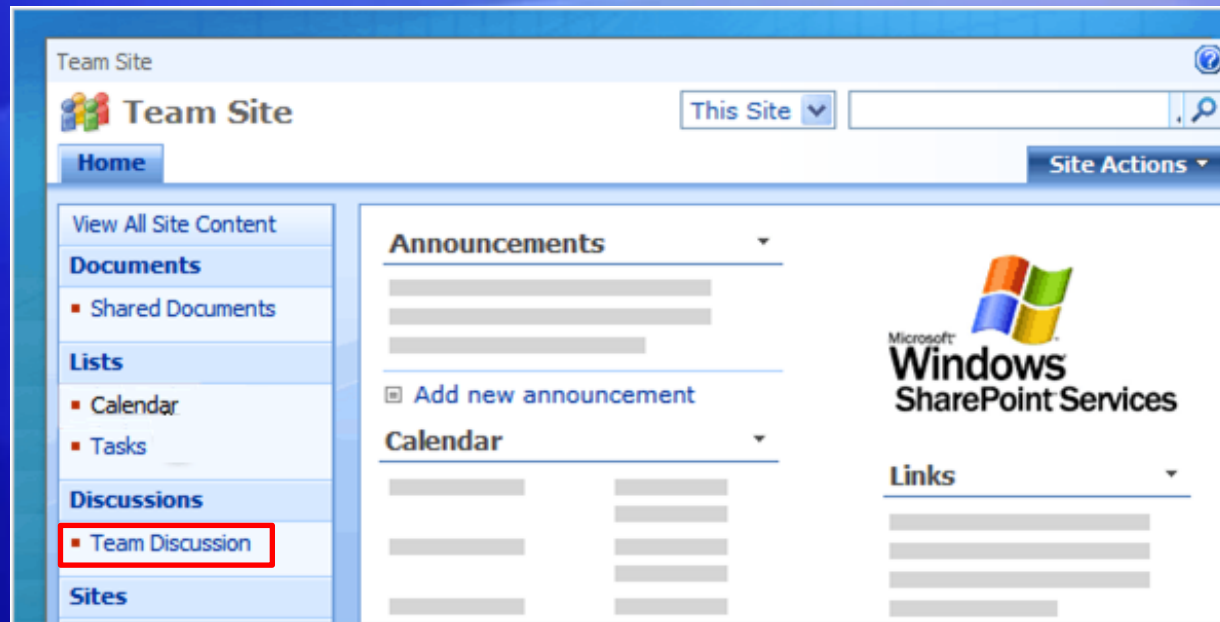
Why use a discussion list on a SharePoint site?

Because it's a great way to hold discussion where multiple users can share information from different places and at different times.

A discussion list on a SharePoint site is similar to a in person discussion that you might hold during your weekly meeting in the office.

Like that in office, the SharePoint discussion list is in a public meeting place — the SharePoint site, where anyone with access to the site can see and use it.

See the discussion list



So, you're ready to try using a discussion list on your organization's SharePoint site.

With many standard deployments of a SharePoint site, a discussion list is already in place.

If that's the case for you, all you'll need to do to access the discussion list is click **Team Discussion** under **Lists** on the Quick Launch, as shown in the picture.

Get around in the discussion list



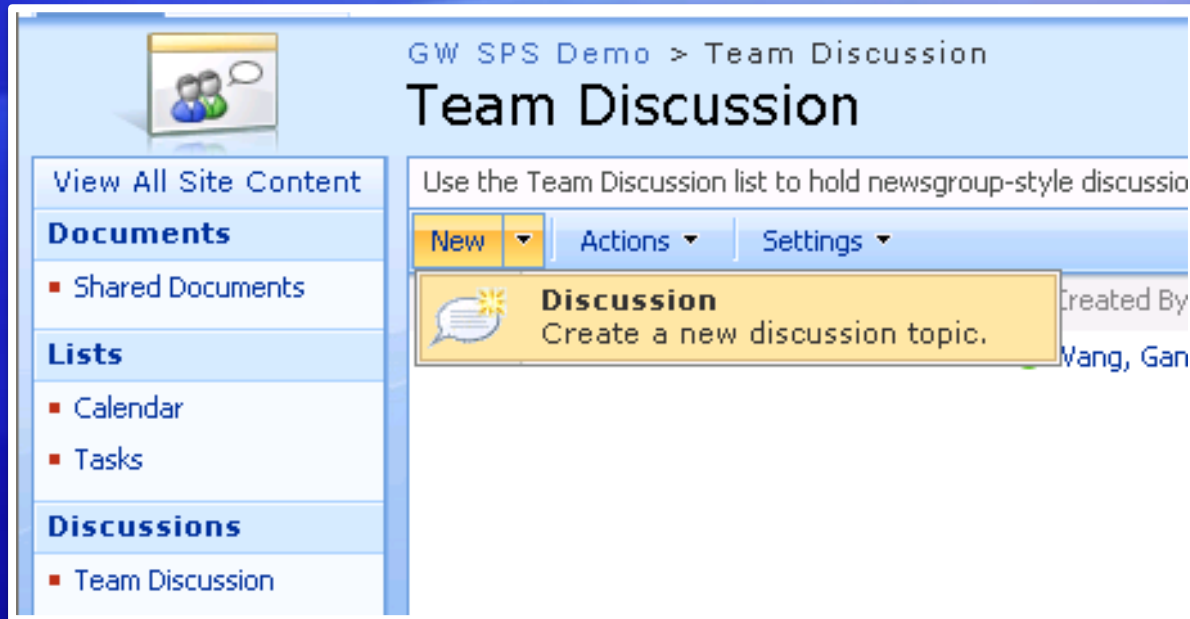
Once you find your discussion list, you'll need to know how to get around in it.

You'll do that by clicking the different controls on the page similar to the calendar.

You can create new discussion, by using the New button. And you can subscribe to alerts, or connect to Outlook using the Actions button.

To quickly view the details of a discussion, click on the linked text under the Subject column heading.

Create new discussions



Now you'll add calendar entries one at a time by clicking **Discussion** on the **New** menu.

Then you'll enter the item's details in a form.

It's easy to create a new discussion to capture the important information that normally would be lost in a traditional discussion.

Reply, edit, or delete an discussion entry



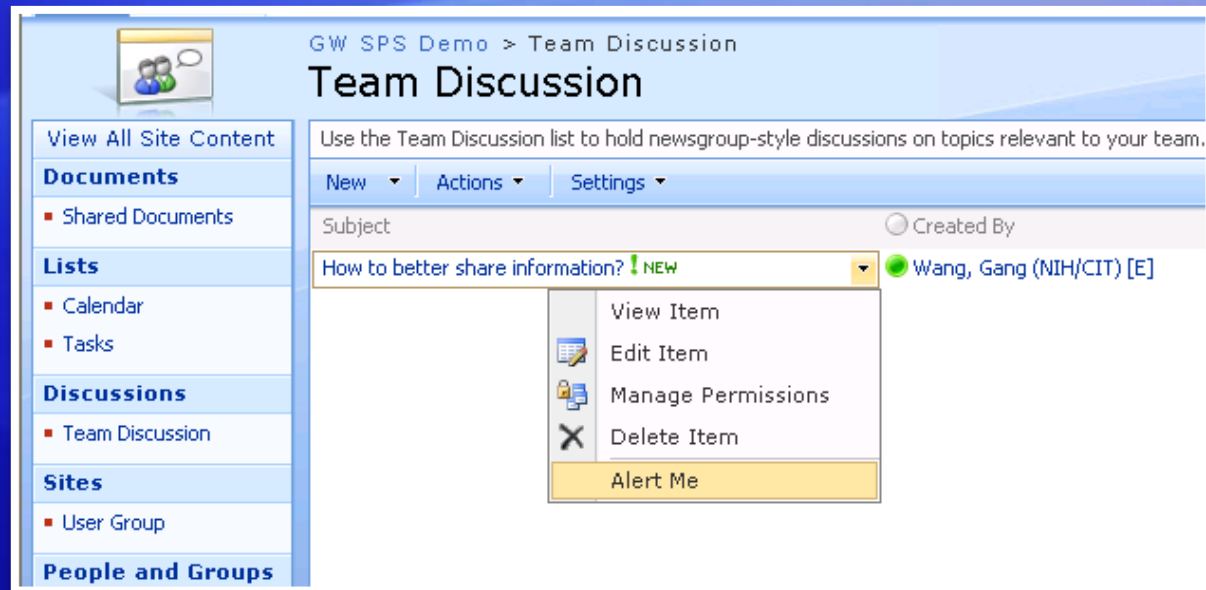
Topic change; you want to be able to update existing entries to reflect those changes.

To reply to an item in the discussion list, click its link to open it, and then **Reply**.

To modify an item in the discussion list, click its link to open it, and then click View Properties. Then change the details by clicking **Edit Item**, as shown in the picture.

To completely remove an item from the discussion list, click **Delete Item** instead.

Alert Me on discussion entries



The benefit of using a discussion list and other lists on a SharePoint site is that users will be able to subscribe to e-mail alert notifying them when there are changes.

An easy way to use the Alert Me feature is by moving on top of a **Subject text link** and click on the **Alert Me** option after you have clicked the little triangle to activate the drop down menu.

You'll then see a form that ask for information to confirm who should receive the alert, what should be alerted on, and the frequency of the alert.

Lesson 1 Demo

1. Use a discussion list on a SharePoint site
 - Navigate in discussion list
 - Add a new discussion
 - Reply, edit, or delete a discussion entry
 - Create an Alert Me on a discussion
 - Q/A

Section IV contents

- SharePoint issues tracking list
 - Lesson 1: Use a issues tracking list on a SharePoint site

Each lesson concludes with a short follow along demo to reinforce your understanding of the material.

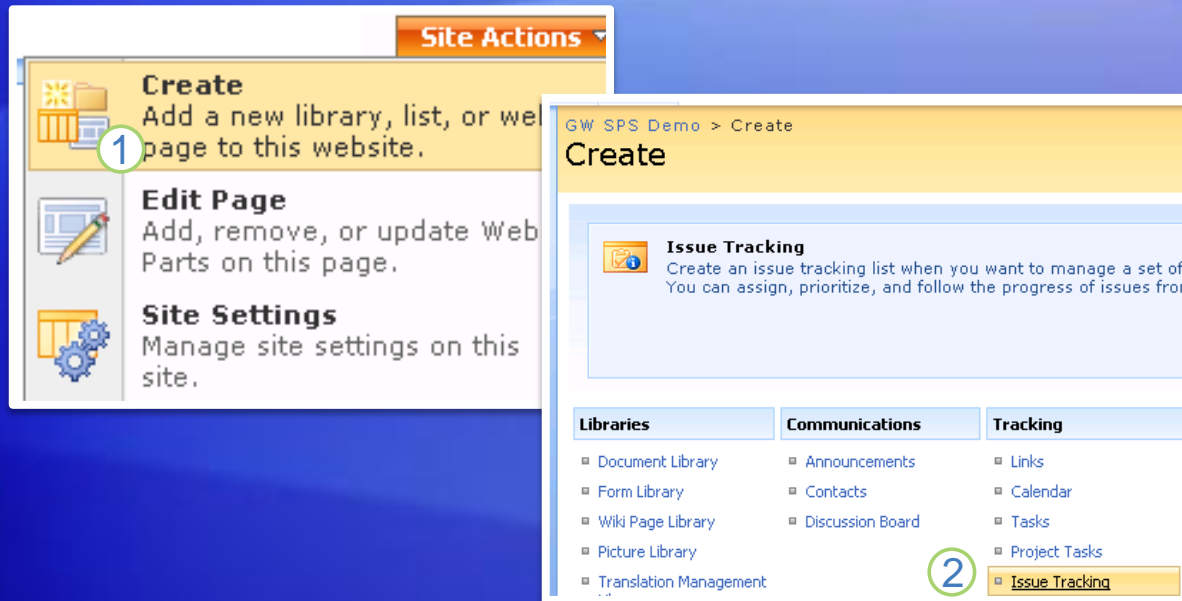
Section IV goals

- Manage a set of issues or problems by entering it in a shared issues tracking list on the SharePoint site.
- Add, update, or delete entries in the issues tracking list.

Lesson 1

Use a issues tracking list on a
SharePoint site

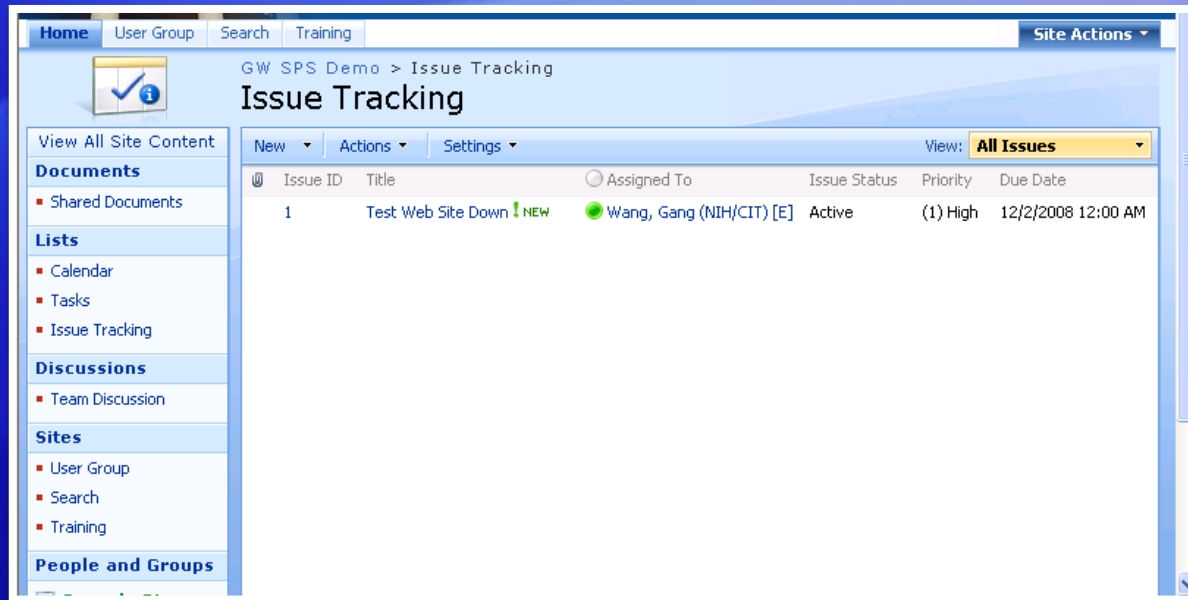
Create an issues tracking list on a SharePoint site



So, you're ready to try creating an issues tracking list on your organization's SharePoint site.

- 1 On the top right area of the site, and then click on the Site Actions button to select the Create option.
- 2 Click on the Issue Tracking under the Tracking section.

Use an issues tracking list on a SharePoint site

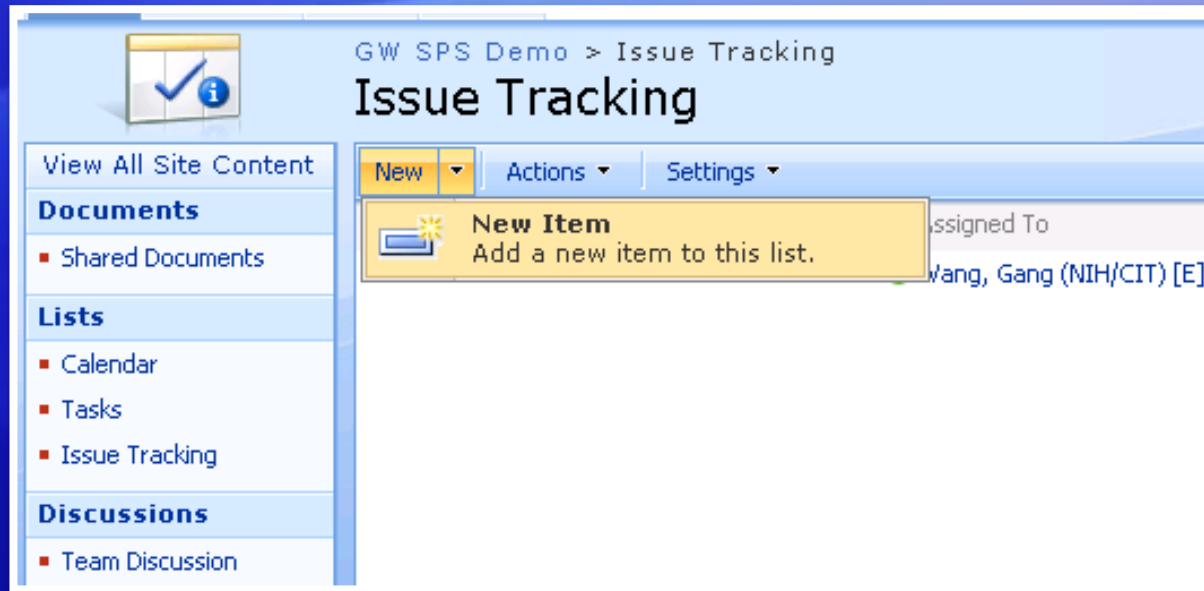


Why use a issues tracking list on a SharePoint site?

Because it's a great way to manage a set of issues or problems without the need of separate issue tracking system.

An issue tracking list on a SharePoint site is similar to a issue tracking system that you might put up in your organization to assign, prioritize, and follow the progress of issues from start to finish.

Enter items



Now you'll add calendar entries one at a time by clicking **New Item** on the **New** menu.

Then you'll enter the item's details in a form.

By now, you should be familiar with this **New** menu option. This option is available in all the SharePoint lists.

Change in issues? Edit or delete an entry

GW SPS Demo > Issue Tracking > Test Web Site Down

Issue Tracking: Test Web Site Down

Close

New Item | Edit Item | Delete Item | Manage Permissions | Alert Me | Version History

Title	Test Web Site Down
Assigned To	Wang, Gang (NIH/CIT) [E] 
Issue Status	Active
Priority	(1) High
Description	The test web site service hosted on the Linux server was out between 11AM and 12PM.
Category	(1) Linux

Problem evolve; you want to be able to update existing issue entries to reflect those changes.

To modify an item in the issue tracking list, click its link to open it. Then change the details by clicking **Edit Item**, as shown in the picture.

To completely remove an item from the issue tracking list, click its link to open it, and then click **Delete Item**.

Notify owner of the issue

GW SPS Demo > Issue Tracking > Settings > Advanced Settings

List Advanced Settings: Issue Tracking

Content Types Specify whether to allow the management of content types on this list. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.	Allow management of content types? <input type="radio"/> Yes <input checked="" type="radio"/> No
E-Mail Notification Send e-mail when ownership is assigned or when an item has been changed.	Send e-mail when ownership is assigned? <input checked="" type="radio"/> Yes <input type="radio"/> No

The benefit of using an issue tracking list on a SharePoint site is that issues can be properly managed — but only if the issue owner is being informed of the progress.

You'll want to make sure the **E-mail Notification** is turned on under the **Advanced Settings** section of issue tracking list **Settings** page.

Lesson 1 Demo

1. Use an issues tracking list on a SharePoint site

- Create an issues tracking list
- Add a new issue
- Edit or remove an issue
- Enable E-mail Notification
- Q/A

Section V contents

- SharePoint contacts list
 - Lesson 1: Use a contacts list on a SharePoint site

Each lesson concludes with a short follow along demo to reinforce your understanding of the material.

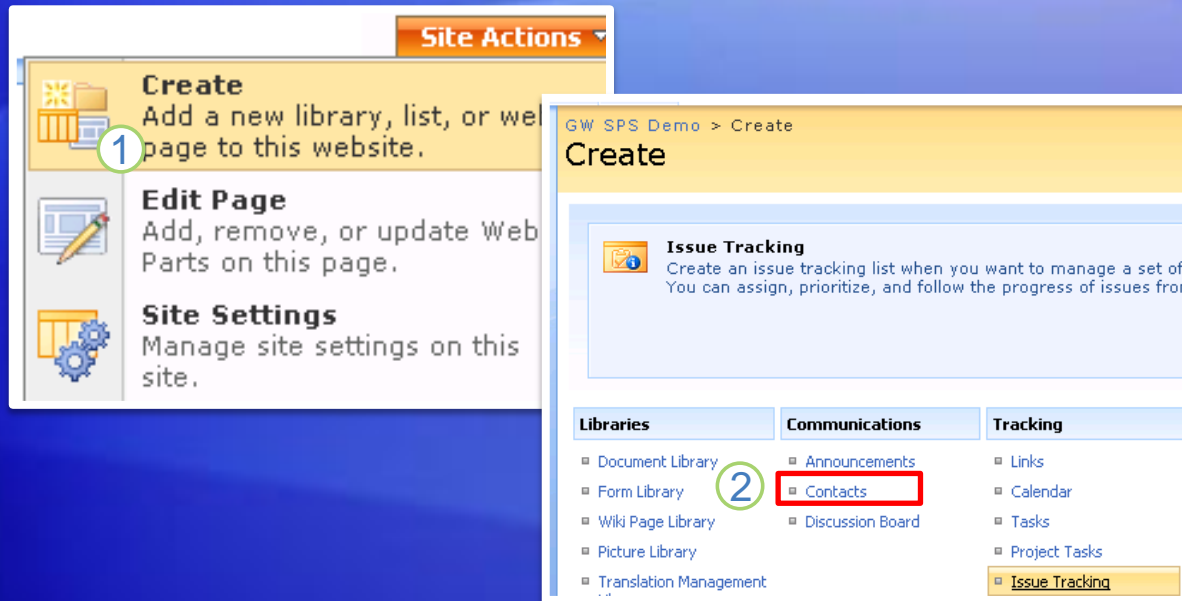
Section V goals

- Manage information about people that your team works with by entering it in a shared contacts list on the SharePoint site.
- Enter, update, or delete people in bulk in the contacts list.

Lesson 1

Use a contacts list on a
SharePoint site

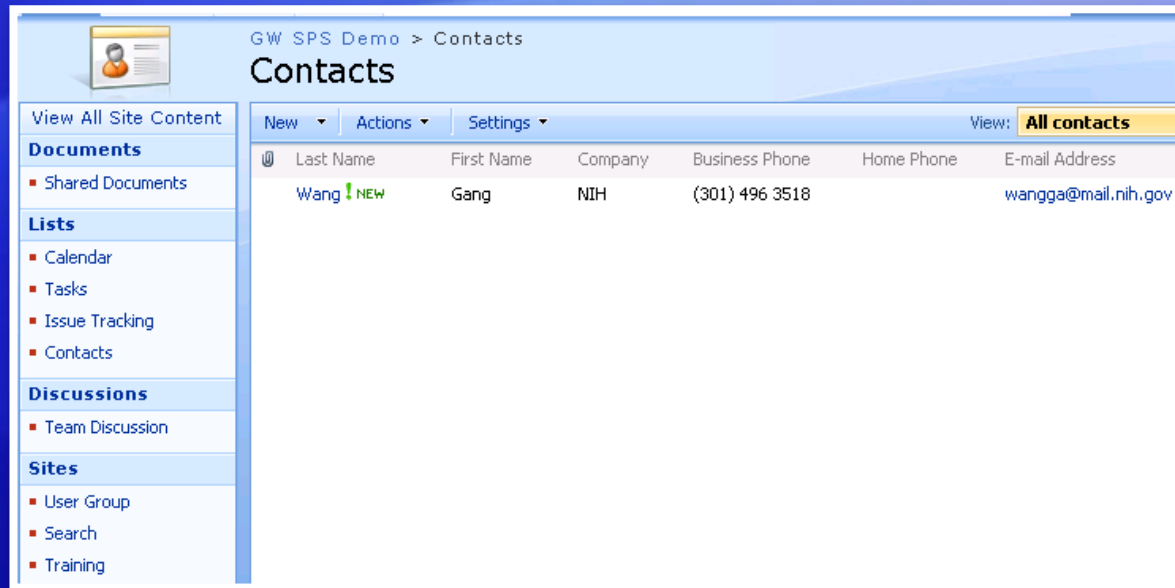
Create a contacts list on a SharePoint site



So, you're ready to try creating an contact list on your organization's SharePoint site.

- 1 On the top right area of the site, and then click on the Site Actions button to select the Create option.
- 2 Click on the Contacts under the Communications section.

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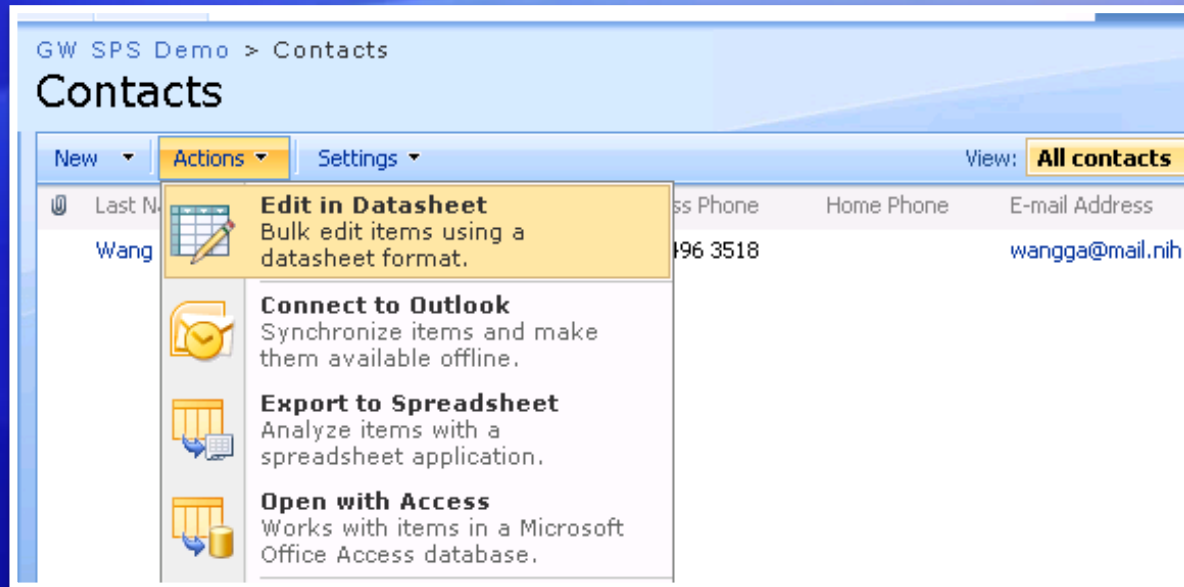
Why use a issues contacts list on a SharePoint site?

Because it's a great way to manage information on customers or partners from one location.

An contacts list on a SharePoint site is similar to a phone list that you might publish in your organization to store information on customers or partners.

Also, a SharePoint contacts list can be accessed just like your Outlook contacts.

Enter, update, or delete items in bulk



You can use data view to enter, update, or delete items in bulk by clicking **Edit in Data View** on the **Actions** menu.

Alternatively, you can use the **New** menu option to enter items, use **Edit** in the Item's properties view to update items, or **Delete** this item in the properties view to delete items. This option is available in all the SharePoint lists.

Lesson 1 Demo

1. Use a contacts list on a SharePoint site

- Create a contacts list
- Edit in Data View
- Q/A

Recycle Bin Demo

1. Use the Recycle Bin on a SharePoint site

- Delete and Restore
- Q/A

Project List Demo

1. Use a project list on a SharePoint site

- Create a project list
- Q/A

Extra:
SharePoint project list

Project Site Demo

1. Use a project site on a SharePoint site

- Create a project site
- Grant user access to the site
- Q/A

Extra:
SharePoint project site

Interested in advanced topics?

- **Business Data Catalog**
- **Excel Services**
- **InfoPath Forms**
- **Search**
- **Workflows**

Extra:
SharePoint project site

Training Survey